Agency User Guide

STATE SURPLUS PROPERTY
NORTH DAKOTA

AssetWORKS

October 2016

Login To Assetworks

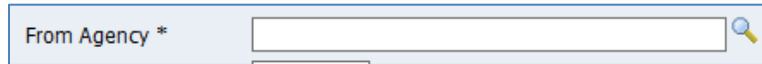## www.nd.gov/omb/surplus

Contents

About the Guide

This guide is setup for Agency Users to utilize and reference for understanding the various processes throughout the system.   Also, there are tips to give users insight on best practices within the system.

Getting Started

Here's a list of "need to know" functionality that is available throughout the system depending what screen or process is involved.

- An * next to any field in the system means that that field is required.

- Anytime you see the magnifying glass icon, it means that the field is a lookup field.


Users can start typing in the name of the agency just by clicking in the field and starting to type part of the agency name. Users can also click the magnifying glass icon to see a list of all available options in that field.

- Date fields are in this layout: MM/DD/YYYY. Users can enter date as 5/1/2013 or 05/01/2013 or use the Calendar selection.

*NOTE: the / (slashes) are required when entering the date manually.

- Any time you see the download link under a list it means the list is downloadable to Excel.

View	Asset Number	Description	Full Name	Request Date	Status
	S-13-103905-002	aircraft 2	KIM VELA	04/17/2013 08:47:35 am	PENDING
	S-13-104055-002	Glider	RON DORN	05/09/2013 08:57:34 am	PENDING
	S-13-104055-002	Glider	TRAINER SMITH	05/09/2013 01:11:38 pm	PENDING
	S-13-104058-002	665456	TRAINER SMITH	05/09/2013 01:30:23 pm	PENDING

Download

row(s) 1 - 4 of 4

Accessing Assetworks

Registered users can access the system from: https://www.nd.gov/omb/agency/state-surplus-property/transferring-property

*Note: Users must use Internet Explorer browser to access Assetworks.
**Note: Users with NDGOV logins should use their state Active Directory username and password.

***Note: The first time users with NDGOV logins access the system, only a "Home" tab will be available until your security has been assigned by a Surplus Property staff member. User will be notified by email when their access has been assigned. Please allow 24-48 hours for security roles to be assigned.

After the security role has been assigned, Users will now see the Welcome/Home Screen similar to the one below.

The top of the screen contains the following links:

Home - Returns users to the main Welcome page.

Help - Opens a window with additional help about the current screen.

Support - Opens a window that allows users to send a message or question to AssetWorks technical support staff.

Sign Out - Signs users out of the application when they are finished.

Quick Search Menu- Enter any portion of an asset or transfer number and then press the Search button to retrieve a list of matching assets or surplus transfers.

User Info - Displays information related to the current user account. Users without a NDGOV login can change their password at any time. All users can view the Web Surplus site by clicking the Web Surplus button.
*Note: You will be automatically logged out of AssetWorks and logged into Web Surplus. For further information on Web Surplus, please see the Web Surplus section of this guide.

State Surplus Transfers

This screen allows users to create new surplus transfers and search for existing transfers.
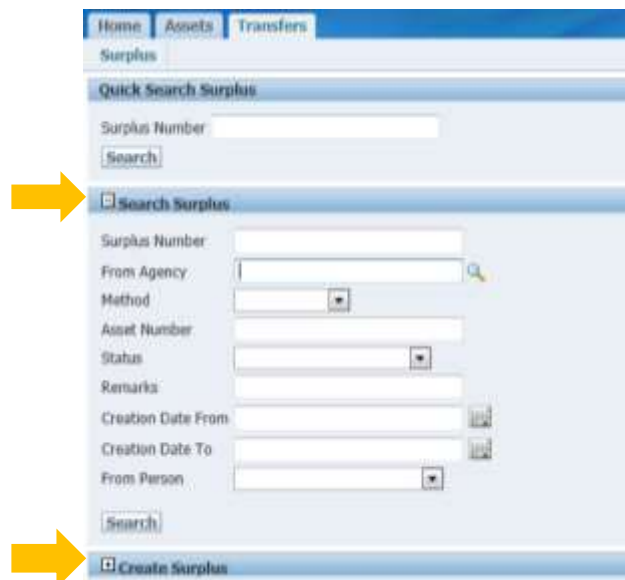
Quick Search Transfers
To quickly search for an existing surplus transfer by its Surplus Transfer Number, enter a Surplus Number into the field and press the Enter key or click the Search button.

Search Surplus
To refine your search of existing surplus transfers, click the plus icon on the Search Surplus region. This will open up the region and allow you to specify additional criteria.

Creating a Surplus

To create a new surplus transfer for one or more assets, click the plus icon on the Create Surplus region. Enter relevant and required information then click the Create button.

From Agency: Enter the From Agency.
*Note: Your assigned agency will be the default. Users can only create Surplus Transfers for their assigned agency(s).

Transportation Type: Choose either Delivery or Pickup.
*Note: If pickup is selected; you must continue to call Surplus Property to schedule the pickup.

Transportation Date: Enter the date the transfer will be available for pickup/delivery.
*Note: Existing pickup schedules from your location will not be changed.

Transportation Time: Specify time transfer will be available for pickup or delivered to Surplus Property. *Note: Existing pickup schedules from your location will not be changed.

Notes/Comments: Enter any notes or comments into this field.

Property Location: These address fields will default from the logged in user's agency location. These fields are used to inform Surplus staff where the property is located within your agency.

Pickup Contact Name: Enter the Contact Name of the person to contact regarding this surplus.

Pickup Contact Phone: Enter the Contact's phone number.

Pickup Contact Email: Enter the Contact's email address.

Pickup Location Notes: Add any additional location notes.

Pickup/Delivery Method: Choose a method from the drop down list.

Surplus Detail
Once a Surplus is created, the user is taken to the Surplus Detail screen.
*Note: If the Surplus Transfer Detail needs to be updated, click the Edit button to make those changes.

Surplus

Successfully edited Surplus.

Surplus Detail

Surplus Number	S-13-107935	**-- Preparer Information --**	
Creation Date	11/25/2013	Preparer Name	AGENCY USER
From Agency	11030 - OMB-CENTRAL SERVICES DIVISION	Preparer Phone	(701) 328-2683
Transportation Type	Pickup	Preparer Email	SURPLUSADMIN@ND.GOV
Transportation Date	11/25/2013	**-- Pickup Information --**	
Transportation Time	9:00	Pickup Contact Name	Tosha Werner
Notes/Comments		Pickup Contact Phone	7013282683
-- Property Location --		Pickup Contact Email	twerner@nd.gov
Address 1	600 E BOULEVARD AVE DEPT 012	Pickup Location Notes	loading dock
Address 2		Pickup/Delivery Method	BOX TRUCK
City	BISMARCK		
State	NORTH DAKOTA		
Zip	58505		
County	BURLEIGH		

Edit

Add Assets

Create New Asset

Adding Asset/Property to a Surplus

To add the assets/property to the Surplus, click the **Create New Asset** link.

Insert Surplus Asset

Close   Save & Same   Save & New   Save & Done

Asset Number *	[AUTO-ASSIGN]	**-- Original Acquisition --**	
Asset Tag Number	6548984	Date *	05/01/2010
NSN Group Code *	7435 - OFFICE INFORMATION SYSTEM EQUIPMENT (	Method *	STATE SURPLUS
Description *	Computer, desktop	Accounting Description	
Agency *	11030 - OMB-CENTRAL SERVICES DIVISION	Cost *	535.00
-- Summary --		**-- Computers or Mobile Devices --**	
Condition *	Good	Processor	2.5ghz
Serial Number	GHRW234678454	Hard Drive Size	250gb
Make	HP	Ram (Memory)	4gb
Model	dc7800	Product #	
Year		Operating Platform	XP Professionsl
VIN		**-- Surplus Info --**	
Odometer or Hours		Quantity *	1
Odometer or Hours UoM		UoM *	EA - EACH
-- Notes --			
Notes 1	runs fine		
Notes 2	w/power cord		
Notes 3			

> Remember: Please add as much detail as possible about the asset. This not only helps the Surplus staff,   but will also help in the redistribution/sale of the asset.

Asset Tag Number: If this is a state asset that is tagged, enter that number in this field.

NSN Group Code: The NSN Group Code is the category grouping for the property. You can either start typing in the box or click on the magnifying glass to see all the codes available. A list of commonly used codes is available at the end of this guide.

Description: Enter the basic description of the property. Examples: Desk, Computer, Monitor, Chair.

Condition: Enter the condition of the property.
        Good – Usable without repair
        Fair – Usable, may need repairs
        Poor – Will need major repairs
        Scrap – Material content value only
        *Note: If Fair or Poor, list what is wrong with the property in the Notes.

Serial Number: Enter the serial number of the property, if available.

Make: Enter the make of the property.

Model: Enter the model of the property.

Model Year: Enter the model year of the property.

VIN: If a vehicle is being surplused enter the VIN number of the property.

Odometer or Hours: If vehicle or the like is being surplused, enter the odometer mileage or the number of hours on the equipment.

Odometer or Hours UoM: Select unit of measure, either miles or hours.

Notes 1: Enter any additional notes concerning the property.

Notes 2: Enter any additional notes concerning the property.

> This information will be available for viewing while shopping the property online.

Notes 3: Enter additional notes about the property. Example: desk measures 48" x 32", or file cabinet has 4 drawers

Date: Enter the original acquisition date of the property, if available.

Accounting Description: May use this field for internal use if needed or leave this field blank.

Cost: Enter the original acquisition cost of the property, if available.

Processor: Enter the Processer type.

Hard Drive Size: Enter the Hard Drive Size.

Ram (Memory): Enter the amount of ram or memory that is in the device.

Product #: Enter the product number provided by the manufacturer.

Operating Platform: Enter the operating platform.

Quantity: Enter the total quantity of property.
*Note: If the quantity is more than 1, the items must be identical and not have serial numbers (serialized inventory). If not, perform a Save & Same to duplicate the asset and change serial number as necessary.

UoM: This is the Unit of Measure field that defaults to EA – Each. User can use the drop down list to choose other available Units of Measure.

Once all data has been entered for the applicable fields, users have four options at the top of the Insert Surplus Asset screen:

Close -   Window will close and all data that has been entered will be lost.

Save & Same - Saves the asset and creates copy of asset details for easy entry of a similar asset.

Save & New - Saves the asset and allows immediate entry of another asset.

Save & Done - Saves the asset and closes the Insert Surplus Asset screen. User will be taken back to the Surplus Detail.

If there are more assets/property to add, follow the same process by clicking Create New Asset.

*Note: Saved assets cannot be edited. The asset must be removed and added from scratch. See Remove Assets section of this manual.

Surplus

Surplus Detail

Surplus Number	S-13-106731
Creation Date	09/05/2013
From Agency	11030 – OMB-CENTRAL SERVICES DIVISION
Transportation Type	Pickup
Transportation Date	09/05/2013
Transportation Time	9:00
Notes/Comments	pickup at capital dock

-- **Preparer Information** --

Preparer Name	BETH PUTNAM
Preparer Phone	(701) 328-9769
Preparer Email	BEPUTNAM@ND.GOV

-- **Pickup Information** --

Pickup Contact Name	Tosha Werner
Pickup Contact Phone	701.328.2683
Pickup Contact Email	twerner@nd.gov
Pickup Location Notes	
Pickup/Delivery Method	BOX TRUCK

[Edit]

Add Assets

Create New Asset

Assets

View	Asset Number	Description	Qty Sent	Qty Rcvd	Service Charge	Scrap	Status	Receiver	Recv Date	Approve Date	Freight Co
	S-13-106731-001-NT	Computer, laptop	1	-	-	-	In Transfer	-	-	-	-
	S-13-106731-002-NT	Chair	1	-	-	-	In Transfer	-	-	-	-
	S-13-106731-003-NT	Computer, desktop	1	-	-	-	In Transfer	-	-	-	-

Download

Adding Images

Once the asset/property has been added to the Surplus, users can attach/upload a picture for each asset using the Docs/Images section next to each asset. Click the 0 under the Docs/Images header next to the asset. An Attachment Insert window will open.

Number	Description	Qty Sent	Qty Rcvd	Service Charge	Scrap	Status	Receiver	Recv Date	Approve Date	GreenND Fee	GreenND Fee Comments	Docs/Images
889-001-NT	Vessel	1	-	-	-	In Transfer	-	-	-	-	-	0
889-002-NT	Desks	50	-	-	-	In Transfer	-	-	-	-	-	0

Click the Browse button to search where the documents or images are located on the computer.

Choose the location where the document/image is located. Double click on the document/image. Or select the document/image and click open to add the document/image to the asset.

You may enter a comment (ex: Computer) to further detail the picture.

Then choose either: Close, Save & New (to add more documents or images for this asset only) or Save & Close (when finished).

Users will now be able to see that a document/image was added to the asset. Clicking on the quantity number will open the attachment window and show the document/image and comment(s). These images will be displayed on Web Surplus to users can shop and request the property.

Docs/Images
1
0
0

10

Users may click on the document/image to open an image detail screen. In the image detail screen the document/image may be deleted if needed.

Removing Assets from Surplus

To remove an asset once it has been added to the Surplus Transfer, click the Remove Asset button.

The Create New Asset section changes to Remove Assets and allows you to select the asset number to remove.

Print Labels

Print labels via the [Print Labels] button and attach the printed label to the property you are disposing of.

A report window will open. Once the label appears on the screen, click the print icon to print the label(s). Each label will print on a separate 8.5"x11" page. If the item entered has a quantity greater than 1 for an asset, print an additional copy for each identical asset and affix the label to the property. Example: you are disposing of 5 keyboards that are identical, they all have the same asset number assigned, print 5 labels and affix 1 label to each keyboard.

*Note: Reports require Crystal Report ActiveX Viewer to be installed the first time a report is run. There is an Installing Crystal Report ActiveX reference sheet at the end of this guide. If you are unable to install the ActiveX, please contact your IT department.
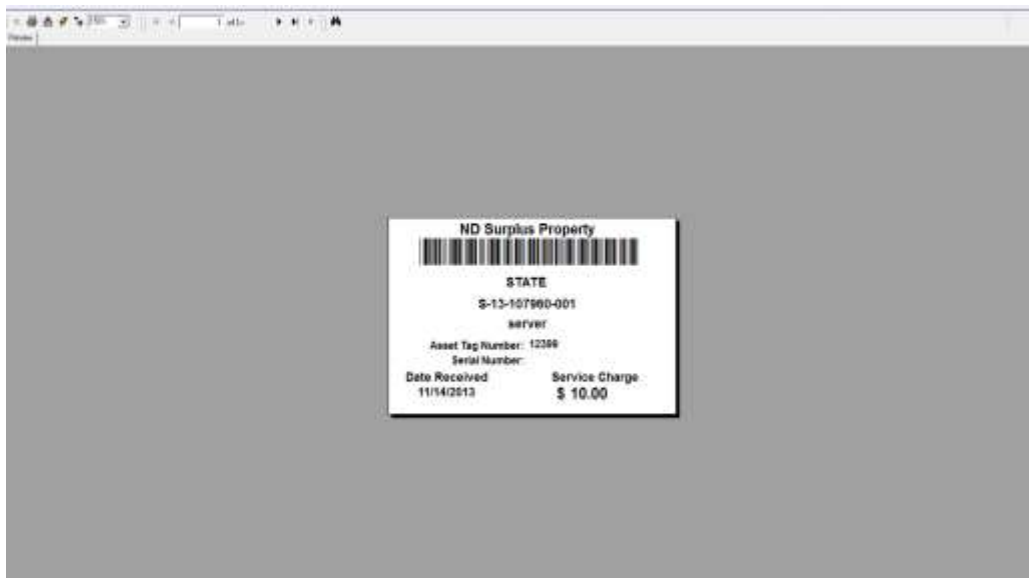
**Note: To print labels, users must use Internet Explorer and have the bar code fonts installed. The fonts needed are Gill Sans TT, Free 3 of 9 Extended, and Free 3 of 9 Regular. There is an Installation of Fonts for Barcode Labels reference sheet at the end of this guide. Contact your IT department for assistance with installing these fonts.

***Note: Depending on the properties of your printer, you may have to change the paper type to Letter or 8.5"x11" when printing the label for it to print properly.

****Note: Each evening an email is sent to the designated Surplus Property Liaison for your agency. This email will inform the liaison that a Surplus Transfer is pending their approval.

Approving Surpluses

To approve a Surplus Transfer, the designated Surplus Property Liaison will need to click on the Transfers tab and either type the surplus number in the Surplus Number field or use the Search Surplus region. If using the Search Surplus region, choose your agency in the From Agency field; change the Status to Waiting for Approval, then click the Search button.

Once the surplus transfer is found, click the View button to be taken to the Surplus Transfer detail.

Search Results

View	Surplus Number	From Agency		Method
✎	S-13-104021	19000 - RETIREMENT & INVESTMENT OFFICE		State Surplus

Download

On the Surplus Transfer Detail screen, review asset(s) listed to ensure they are correct. To see more detail for each asset, click the View button next to the Asset Number.

Assets

View	Asset Number	Description	Qty Sent	Qty Rcvd	Service Charge	Scrap	Status
✎	S-13-108192-002-NT	HP Computer	1	-	-	-	In Transfer

Download

[Cancel] [Remove Asset] [Approve] [Receive] [Print Labels] [Print Detail]

Click on the Asset Number to see the details that were entered by the User.

Surplus Asset Line Detail

Surplus Number	S-13-108192
Asset Number	S-13-108192-002-NT
From Agency	11030 - OMB-CENTRAL SERVICES DIVISION
Qty Sent	1
Qty Rcvd	
Cost	$0.00
Service Charge	

[Cancel]

Nontagged Asset Detail

[Cancel] [Save Asset]

Asset Number *	S-13-108192-002-NT		Status *	In Transfer
Asset Tag Number	PUR0903C		-- Original Acquisition --	
NSN Group Code *	7435 - OFFICE INFORMATION SYSTEM EQUIPMENT (743 🔍)		Original Acq Cost	$0.00
Description *	HP Computer		Original Acq Date	11/26/2013
Agency *	11030 - OMB-CENTRAL SERVICES DIVISION		-- Computers or Mobile Devices --	
-- Summary --			Processor	
Condition *	Good ▾		Hard Drive Size	
Serial Number			Ram (Memory)	
Make			Product #	
Model			Operating Platform	
Year			-- Surplus Use Only --	
VIN			Quantity *	1
Odometer or Hours			UoM *	EA - EACH
Odometer or Hours UoM	▾		Freight Cost	
-- Notes --			Repair Cost	
Notes 1				
Notes 2				
Notes 3				

After reviewing the Asset Details, the Approver will need to navigate back to the Surplus Detail screen and click the Approve button at the bottom of the screen.

Approvers will be taken to the next screen where they will need to change the Approved field via the drop down list next to each asset listed. Click the Approved drop down list and chose either Approved or Rejected.

If there are several assets on the Surplus transfer, users can use the blue arrow next to the Approved to do a "apply all". Once the correct status is selected, the system will copy that status to every asset. Once the correct approved status is selected, click the Save button.

Reports

Designated Surplus Property Liaisons will have access to the Reports Tab.
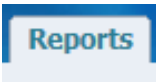
The Surplus Transfer Report can be run by clicking on the red arrow.

Surplus Transfers

Run the report by entering a Surplus Number, Start and End Date, or leave the search fields blank for all asset disposal details for the Agency. This report can be downloaded to Excel or printed to PDF.

SURPLUS NUMBER	CREATION DATE	APPROVED DATE	APPROVER'S NAME	APPROVE STATUS	RECEIVED DATE	RECEIVER'S NAME	STATUS	ASSET NUMBER	TAG NUMBER	DESCRIPTION	WAREHOUSE NUMBER
S-13-104254	06/04/2013	06/04/2013	BETH PUTNAM (BFPUTNAM)	Y	05/29/2013	BETH PUTNAM (BFPUTNAM)	Received	S-13-104254-001-NT		F4 System	S-13-104254-001
S-13-104254	06/04/2013	06/04/2013	BETH PUTNAM (BFPUTNAM)	Y	05/29/2013	BETH PUTNAM (BFPUTNAM)	Received	S-13-104254-002-NT		headset	S-13-104254-002
S-13-104254	06/04/2013	06/04/2013	BETH PUTNAM (BFPUTNAM)	Y	05/29/2013	BETH PUTNAM (BFPUTNAM)	Received	S-13-104254-003-NT	PUR09061	table	S-13-104254-003

Web Surplus

View all available surplus property from our on-line shopping portal, Web Surplus. The link can be found at https://www.nd.gov/omb/agency/state-surplus-property/shop-our-property click on 'North Dakota State Surplus Property'.

Viewing/Searching Items in Web Surplus

From the Home screen, Web Surplus allows a search or narrowing down of available property by clicking the View All Items button, clicking on a category of items, or performing a keyword search. The system will show all active state and federal property. The User can sort items by clicking on the column header.

View Item Details

Click on the item image or description to "drill" down to the details about the item.

Logging into Web Surplus

Authorized users can [Login To Web Surplus](https://ams.incircuit.com/eams4/f?p=1043:1500), https://ams.incircuit.com/eams4/f?p=1043:1500, by clicking the Login link at the top of the page.

*Note: Only approved buyers for an eligible organization (State agencies, political subdivision, schools, etc.) will be granted logins. Approved users can view and request available property based on their assigned priority screening level. Registered users can also create a user definable want list to be notified when specific types of property become available.

The User enters their Username and   Password.

Eligible Users will now see the Web Surplus Home screen, with additional options available.

Placing Items on Hold

Place items on hold by clicking the Hold Asset button found within the item details.

*Note: Upon approval of the hold request from Surplus Property Staff, held property must be picked up at the property location within 5 business days.

Users can see all their current hold assets from the Home Screen.

Removing Items from Hold

Remove an asset's hold status by clicking 'View My Current Holds' from the Web Surplus Home page. Click on the Asset you wish to remove the hold from and click 'Remove Hold'.

Create a Shopping List (Wants)

Authorized users can create a customized list of wanted items using the Want List feature. Use keywords to define the type of item you are looking for. When items with those keywords are received at Surplus Property you will receive an email notification.

Click View My Current Want List to view existing lists or create a new list.

Click the red arrow to add new search criteria.

Support

For questions and/or other support, please click the Support link.

Fill out the form and click Send Email and someone will contact you.

Installing Crystal Report ActiveX

Have someone from your IT Department perform the below installations and re-run your report upon completion.

This window appears first time user clicks on "Print Label" button. User needs to have Administrative rights on the computer in order to install. Cannot print labels without this.
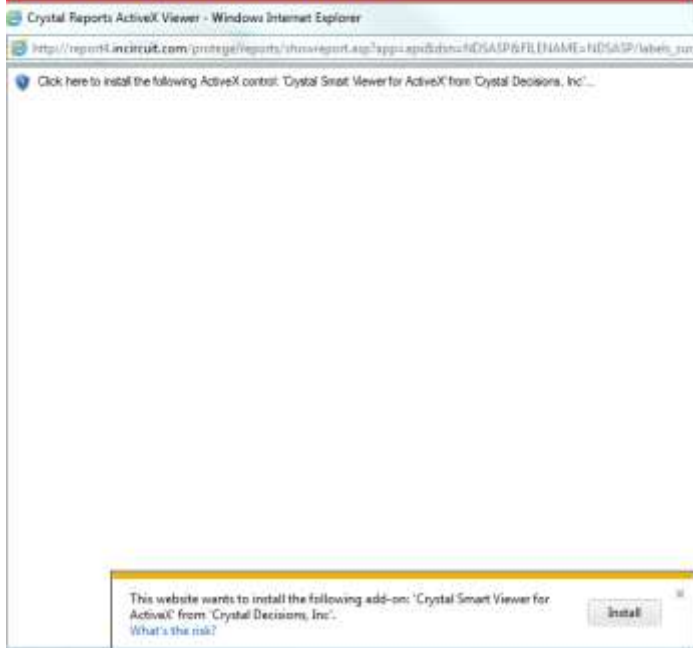
This second screen appears a few seconds after installing Crystal Smart Viewer. Click "Allow" in the drop down box so the Crystal Web Report Broker add-on can run.
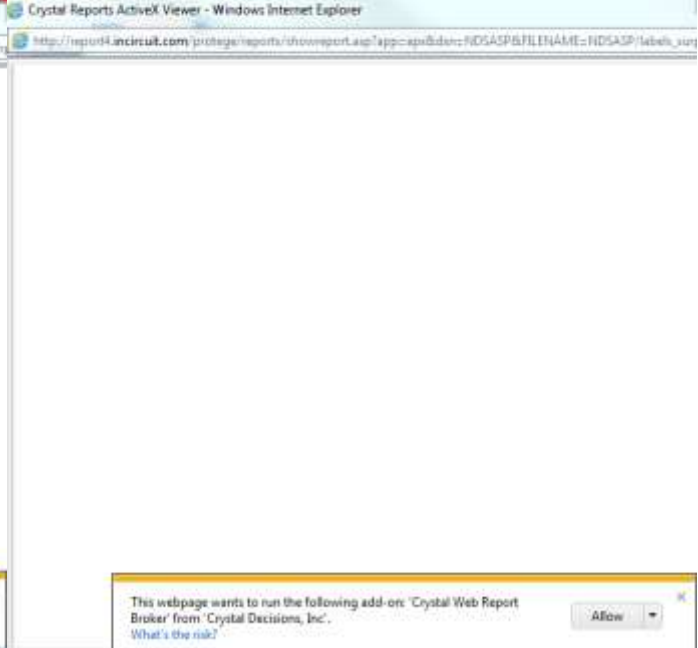
This third screen appears after allowing the Crystal Web Report Broker add-on. Click on "Allow" so that the Smart Viewer Helper add-on can run.
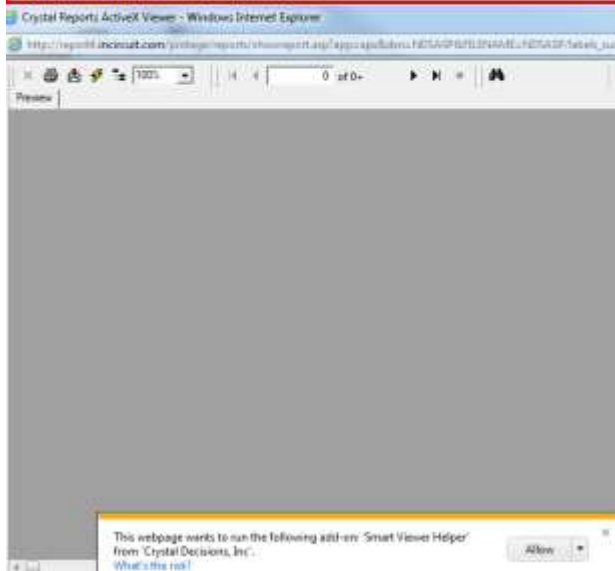
This fourth screen appears after allowing the Smart Viewer Helper add-on run. This is the same add-on as the second screen. Click "Allow" again.
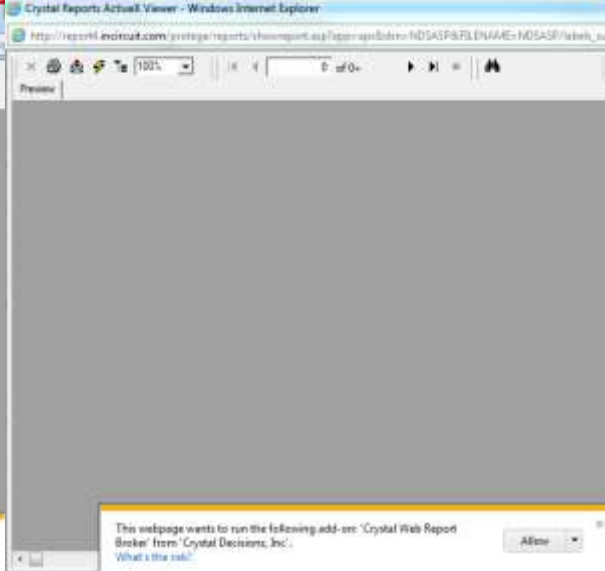
Final screen appears stating "A report name was not specified". Click Ok. Close this window and click the "Print Label" button again. You should now see the label with the information you entered and a barcode. If you see numbers instead of a barcode, please install the barcode fonts from the Surplus website.
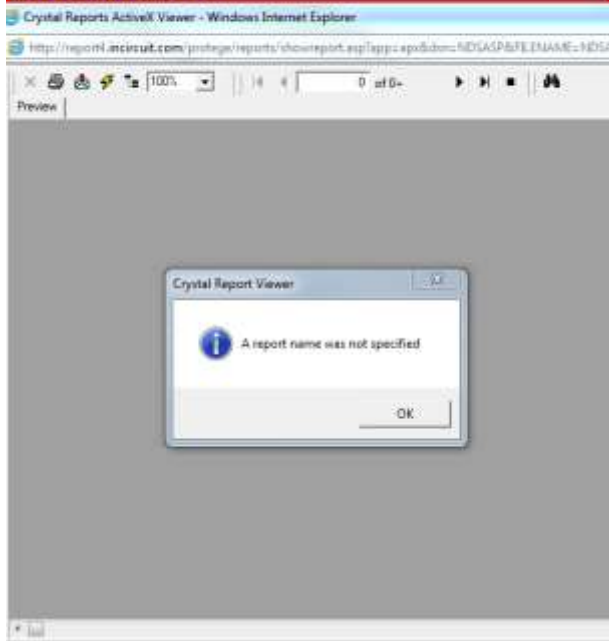
Installation of Fonts for Barcode Labels for Windows 7

User must have Administrative Rights on their computer in order to install these. Contact your IT Department if you don't have access or need assistance with the below instructions.

Download Barcode Label Fonts

1. Download the fonts from Surplus Property Website at https://www.nd.gov/omb/agency/state-surplus-property/transferring-property
    a. Click Barcode Fonts Zip File
    b. When prompted, choose Save File.
    c. When the Save As dialog box opens, choose where to save the file. *Make sure you note the location of where you are saving it.
    d. When done saving, choose Open.
    e. Proceed to Install Barcode Label Fonts below

Install Barcode Label Fonts

Perform the below steps to install the following fonts; FRE3OF9X, FREE3OF9, and GILL___.

1. Click Start
2. Click Control Panel
3. Click on Appearance & Personalization
4. Click on Fonts
5. Double click on the first font to install
6. Click Install
7. Window will appear saying "installing name of font"
8. When it's done the Install button is grayed out
9. Close Font window
10. Login to AssetWorks
11. Find an asset
12. Click "Print Label" button from the Asset Detail screen and you should now see a barcode instead of the numbers.

Other Resources: Below is a website that shows an example of what the screen looks like to install the fonts. It also gives directions on how to install for XP, Vista, and Windows 8.

http://www.microsoft.com/typography/truetypeinstall.mspx

Commonly Used NSN Group Code

Description	NSN Number
Accounting & Calculating Machines	7420
Athletic & Sporting Equipment	7810
Books & Pamphlets	7610
Brooms, Brushes, Mops & Sponges	7920
Cabinets, Lockers, Bins, & Shelving	7125
Cameras, Motion Picture	6710
Cameras, Still Picture	6720
Floor Polishers & Vacuum Cleaning Equipment	7910
Food Cooking, Baking & Serving Equipment	7310
Footwear, Men's	8430
Footwear, Women's	8435
Garden Implements & Tools	3750
Headsets, Handsets, Microphones & Speakers	5965
Kitchen Equipment & Appliances	7320
Kitchen Hand Tools & Utensils	7330
Medical & Surgical Instruments, Equipment & Supplies	6515
Miscellaneous Vehicular Components	2590
Miscellaneous Machine Tools	3419
Miscellaneous Office Machines	7490
Office Devices & Accessories	7520
Office Furniture	7110
Office Information System Equipment	7435
Office Supplies	7510
Passenger Motor Vehicles	2310
Phonographs, Radios & Television Sets: Home Type	7730
Photographic Projection Equipment	6730
Printing, Duplicating Equipment	3610
Radar Equipment, Except Airborne	5840
Telephone & Telegraph Equipment	5805
Teletype & Facsimile Equipment	5815
Television Sets, Radios, Phonographs	7730
Tires	2630
Tool & Hardware Boxes	5140
Tractors, Wheeled	2420
Trailers	2330
Truck & Tractor Attachments	3830
Trucks & Truck Tractors, Wheeled	2320
Typewriters & Office Type Composing Machines	7430
Vehicular Furniture & Accessories	2540